MAIL SERVICES GUIDE

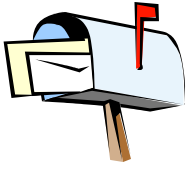**To State Mail Services Customers:**

This **Mail Services Guide** is provided as a resource to help you use the mailing services provided by State Mail Services (SMS). This guide covers such topics as addressing USPS and inter-agency mail, USPS mail classifications and preparation requirements, specialized delivery services, and case file delivery.

SMS's mission is to provide a comprehensive cost effective mail support system for its customer agencies. Our goal is to provide these services to *every* state agency in the Salt Lake Metropolitan area to affect postage savings, labor savings, and delivery enhancements wherever possible.

Please contact us during the early planning stages of your project. We can assist with design, best-way shipping decisions, and specific mail preparation requirements for automated and non-automated mailings. The more we know about your needs and concerns, the better we can fulfill them. Whether you need a special mailing service, are planning a large mailing, or you are sending or receiving something out of the ordinary, please let us know **IN ADVANCE**.
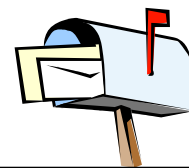
SMS provides regular pickup and delivery of inter-agency mail, United States Postal Service (USPS) letters and packages, as well as FedEx Ground and Express, and DHL mailings for agencies from Payson to Ogden. Our courier stops and times are posted on our web page at www.purchasing.state.ut.us.

We hope that this Guide will be a useful resource manual for you. SMS encourages its customers to participate in SMS-provided training sessions. Should you have a specific question regarding a mailing or would like to schedule a training session, call SMS at 323-4300.

General Information

Address

      Street Address —   250 North 1950 West, Suite C
                                    Salt Lake City, Utah
                                    (just north of the Tax Commission Building)

      Mailing Address — PO Box 141106
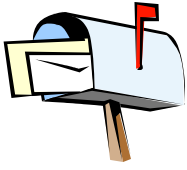   Salt Lake City UT 84114-1106

Contact Information
Main phone number, 323-4300

Assigned Areas	Contact Person	Phone #
Addressing Services	John Larson	323-4305
Business Reply Mail	John Larson	323-4305
Certified/Registered Mail	Debbie Hood (AM) Elaine Strong (PM)	323-4307
Express Mail and Accountable Mail	Steve Connell	323-4303
Folding and Inserting	John Larson	323-4305
	Debbie Hood (AM) Elaine Strong (PM)	323-4307
Courier Service	Steve Connell	323-4303
International Mail	Steve Connell	323-4303
Parcels and Flats Mailings	Steve Connell	323-4303
Best-way Shipping Consultation	Steve Connell	323-4303
Statements or Invoices	Jeanne Farnsworth	323-4300
US Postal Service Mail	Steve Connell	323-4303

      Contact SMS Manager, Blaine Murray, at 323-4304.
      SMS fax number is 323-4310.

Hours of Operation

      SMS is open Monday through Friday from 8:00 AM until 5:00 PM – except Holidays.

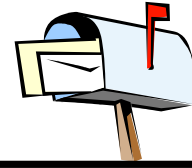## Agency Mail Preparation Responsibilities

Separation Requirements

Please bundle and/or separate your outbound mail as follows, attaching a separate State Mail Authorization Card (SMA Card) to each bundle.

1. **Computer Generated or Typed –** All standard letter-size mail addressed mechanically, using appropriate font and addressing standards. This mail, if printed in a readable font and using acceptable addressing standards (discussed in greater detail later in this Guide) will be processed on the Optical Character Reader (OCR) at a discounted postage rate (up to 9.2 cents per piece discount).

2. **Non-Readable (Hand Written) Mail –** All standard letter-size mail addressed in a non-readable font or addressed by hand. This mail will not be processed on the OCR and does not qualify for postage discounts. Every effort is made to achieve automation discounts for our customers. Therefore, we discourage hand-written addressing of official state correspondence.

3. **Parcels and Flats –** All mail exceeding the maximum dimensions of letter mail (see page 17), and all packages, tubes, and boxes. If the items cannot be bundled together, please attach an SMA card to each item.

4. **Other –** Any mail that does not fit into one of the above four categories (i.e. foreign, Certified, Registered, Express, FedEx, and DHL

Bundling Requirements

1. For automation purposes, all mail within the same bundle must be **faced the same direction** and all flaps must be either up or down.
2. **Since we cannot seal envelopes thicker than ¼" on our automated equipment, the customer must seal all thick envelopes prior to sending them to us for postage.**
3. To secure the bundle of mail during transport, a rubber band must be placed around all bundles of envelopes. Also, to secure the contents, all overstuffed pieces must be sealed prior to sending them to us for processing.
4. To accommodate postage and processing billing, a copy of an SMA card must be attached to each bundle.

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Courier Pickup

SMS couriers are on very tight schedules. They provide mail distribution services to over 430 customer locations each day. These schedules must be maintained so that all mail can be processed and delivered to the USPS by their established deadlines. Couriers are encouraged to accommodate customer requests, within reason. However, while our couriers are prohibited from leaving a stop prior to the normal dispatch time, they have permission to leave the stop at the established time if the mail is not ready.
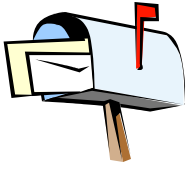
Please have your mail ready for the courier at your normal dispatch time.

State Mail Authorization Cards (SMA Cards)

To send out-going mail, you must obtain an SMA Card containing the correct FI-NET coding for postage and processing billing.

SMS charges postage and service to the appropriate mailer by using these bar-coded SMA cards. Postage and service charges are compiled at the end of each month and billings are prepared and made available to each customer agency. We will not process mail without a valid SMA card or SMS Work Order number attached to the bundle.

Although SMS provides the SMA Cards, we are not responsible for making sure that the correct SMA Card is attached to the mail. **Each customer is responsible for making sure that the appropriate billing account is used.**

State Mail Services

Standard and Presort Discount Programs

SMS offers two presort programs. These programs produce postage savings for automation-compatible one- and two-ounce letters. One program is for envelopes with pre-printed indicias. The other program is for envelopes that have been metered by SMS.

Indicia (Imprint) Mailings
SMS processes Imprint mailings on the OCR each morning before we transition to our metered mailings. Due to the limited volume of Imprint mailings and limited equipment time available for these mailings, SMS requires two-days to process Imprint mailings. Imprints can be used for First Class or Standard mailings. The minimum for Standard Imprint mailings is 200 pieces and 500 pieces for First Class imprint mailings (USPS requirements). Standard mailings can achieve up to a 50% savings over First Class mailings. However, since the USPS assigns a lower priority to Standard mailings, delivery can take a little longer for Standard mailings. The USPS has specific guidelines for the Imprints. The acceptable format for First Class and Standard Imprints is presented below.

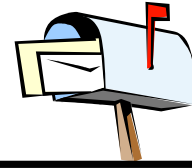| Presorted First-Class U.S. Postage **PAID** Salt Lake City, UT Permit No. 4621	Presorted Standard U.S. Postage **PAID** Salt Lake City, UT Permit No. 4621
Presorted First-Class **U.S. POSTAGE PAID** Salt Lake City, UT Permit 46221	PRSRT STD **U.S. POSTAGE PAID** Salt Lake City, UT Permit No. 4621
First-Class U.S. Postage **PAID** Salt Lake City, UT Permit 4621	Prsrt Std U.S. Postage **PAID** Salt Lake City, UT Permit 4621

Co-Mingle

The vast majority of the state's mail is metered then barcoded and presorted on the OCR. This program produces savings up to $.092 per piece for one and two ounce letters—that is approximately $1,000,000 per year in postage savings. In order to provide this service, the mailer has to adhere to the addressing standards discussed on pg. 17 of this document. First Class metered mail is processed the day that it is received.

The requirements for presort (Imprint and Co-mingle) OCR mailings include:

- Addresses are printed in acceptable fonts
- OCR zone is kept clear of extraneous information
- Staples are not allowed
- Tabbing must be at the top of the mail piece
- Maximum thickness is ¼ inch
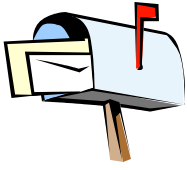
Computer Generated Addressing and Ink Jetting

SMS offers computer generated direct impression addressing (labeling) and address ink jetting (preferred for jobs 2000 pieces or more). Address files can be processed electronically from a number of different programs, *provided the files are formatted properly*. If you print your own labels (to be applied by SMS), use a 3.5" width by 1" height continuous feed label (call SMS for specifics). Courier or Arial fonts are preferred. Proper formatting of the address label and the electronic address file is crucial. Therefore, if you are going to use SMS to print the address label or you are going to use Ink Jetting, it is imperative that you contact John Larson at 323-4305 to plan and schedule the job.

Delivery and Pickup

Mail is picked up and delivered *twice daily* at most state offices along the Wasatch Front. For specific times for your location, visit our web page at http://www.purchasing.state.ut.us.

In order to meet the deadlines established by the USPS, mail must be received at SMS by 5:00 p.m. If you miss the cutoff time, your material may be sent out the next business day depending on that day's mail volume.

Mail picked up by our couriers to be metered that day will be delivered to the USPS that day! To receive prompt service, you must meet the courier dispatch times.

Folding

SMS utilizes 3 automated high-speed folders with a processing capacity of 20,000 pieces per hour. We can perform Z-Folds, C-Folds (Letter Fold), and Half-Folds on standard 8½ X 11, 8½ X 17, sheets and 11 X 17 down to 8½ X11. **Call ahead to schedule these services.**

Inserting

SMS can insert correspondence, reprints, and other printed matter into pre-addressed or window envelops. We offer standard inserting and intelligent inserting services. The intelligent inserter should be used for jobs that consist of multiple and variable inserts/forms to be mailed to the same recipient (e.g., Job Notices, Medical ID Cards, State Park Reservation Confirmations). The inserter accomplishes this by reading optical control marks that have been applied to the mailpiece.

Before submitting a request for folding and inserting, we will be glad to examine sample forms and envelopes to ensure that the materials are properly designed to be processed on our automated mail processing systems and are suitable for automation postage discounts. We can also offer suggestions for size and shape requirements to keep your mailing costs as low as possible. **Call ahead to schedule this service.**

Large Mailings

Large mailings are any mailing consisting of 2,500 pieces or more. Advance notice is required to effectively process large or specialized mailings within your desired mailing deadline. **Call SMS beforehand for assistance and scheduling.**
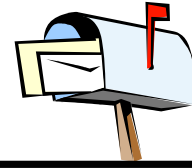
72-hour advance notice is needed to ensure the following items are available (call early in the planning stages of your mailing):

1. Appropriate size and quantity of enclosures, envelopes, and/or corrugated boxes

2. Mail Center personnel and equipment to process the mailing

3. Sufficient postage fees on deposit

Please call if you have an accountable mailing of over 25 pieces.
Because of the time required to process this mail, it must be sent to SMS by (3 p.m.).

Large Flat and Parcel Manifesting Service

In order to economize on freight and postage costs, State Mail Services performs a best-way shipping analysis on all large flat envelopes and parcels. The most cost-effective method of shipment will be chosen for this type of mail. If you prefer that your large flats and parcels be shipped using more expensive First Class USPS mail or next day or second day mail, you must indicate this on the SMA Card. Often, an acceptable shipping method is FedEx Ground. While this service can be a day or two slower, depending on the zone, there are considerable savings available. Depending on the weight of the item, you can save from 24% to 300% as compared to First Class postage. In addition to cost savings, the sender gets the benefit of tracking delivery of the item, which is not available with First Class postage.

Personal Mail

SMS offers cost-free delivery of your stamped personal mail to the USPS. This mail must be bundled separately and placed (without an SMA Card) in a separate "Stamped Mail" location in your department's mail pick-up/delivery area.

YES **Outgoing personal mail must be sealed and the proper postage must be affixed before it can be given to the courier.**
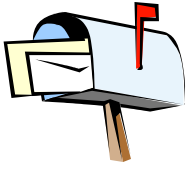
NO **Due to state rules and workload considerations, you should not receive personal correspondence or parcels at your work site.**

Metering and Sealing

SMS utilizes 6 high-speed automated postage meters with a processing capacity of 24,000 pieces per hour. After inserting contents into envelopes, the mailer must ensure that **all envelope flaps within a bundle must be either up or down**. An hourly rate will be charged if SMS personnel have to reorient or reorganize the mail so that it can be processed on our metering/sealing equipment. Also, if we have to seal envelopes by hand, an hourly fee will be assessed.

Inter-Agency Mail

Addressing Inter-Agency Mail

1. **Holey Joes.** Use and reuse Inter-Department envelopes (Holey Joes). To avoid confusion, when addressing a used "Holey Joe", blackout the last completed address line.

2. **Addressing.** Address "Holey Joes" as carefully as you would address a letter for the US Postal Service. Clearly and completely enter both the sender's and the recipient's name and address information. Many agencies have Finance, Personnel, Accounting, etc. sections. Enter the Department or Division information in addition to the building information on the "Holey Joe". Please limit the use of abbreviations.

   Below is an example of proper addressing of a "Holey Joe"

   A customer at State Finance is sending a "Holey Joe" to another customer at the ITS Warehouse. The addressing would be as follows:

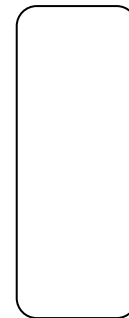 | DATE | DELIVER TO | DEPARTMENT | SENT BY | DEPARTMENT |
   |------|------------|------------|---------|------------|
   | 9/9/02 | Jane Doe | ITS Warehouse 1025 Motor Ave | Howie Long | State Finance 2110 SOB |

3. **Plain Envelopes.** "Holey Joes" should be used when sending inter-agency mail. If this is not possible, however, a #10 or Flat envelope can be used only if the following addressing standards are followed.
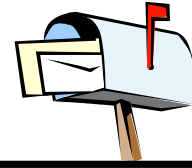
   a) Apply the address parallel to the short end of the envelope.
   b) Apply the address at the top of the envelope.
   c) In large lettering, write **Building Mail** along the top of the envelope and highlight the destination ("To") address

BUILDING MAIL

To: Jane Doe ITS Warehouse 1025 Motor Ave
From: Howie Long State Finance 2110 SOB

Change of Address

Alert SMS in advance if your office is planning to change locations. Send a memo to Blaine Murray, Manager, at bmurray@utah.gov indicating your new location, your old location, your new telephone number(s), and update the name of contact person. Our courier routes are typically full. As such, we request that you locate the mail drop-off/receiving area in close proximity to the entrance of your building/suite.

Confidential Correspondence

Insert confidential material into specially marked inter-agency envelopes to ensure confidentiality and security. These envelopes eliminate the potential for misdirected, mishandled, or lost mail due to previous markings. If this is not possible, clearly mark and seal the envelope and ensure that the addressing is complete and correct.

Non-Mailable Items

Items such as cash, metal pieces, glass parts, product and lab samples, chemicals, etc., **CANNOT** be mailed in envelopes. They require special packaging. Call SMS to determine the most appropriate handling method.
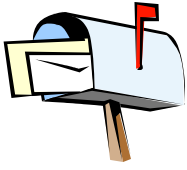
Size & Strength

The size of the inter-agency envelope should properly accommodate the insert(s). For example, excessively large inserts will not be securely contained within standard envelopes. Because of this, the envelope may tear and the contents of the envelope could become lost.

A snug fit keeps the enclosure firm in the envelope. However, if an envelope is overstuffed it may burst at the seams that may also result in lost mail. The envelope should be strong enough to hold its contents.

Envelopes (Types & Sizes) – The size of the envelope should properly accommodate the contents. For use in the USPS system there are two categories of envelopes: "letter size" and "flats". SMS must approve all letter proofs before printing envelopes.

Letters

Minimum size	Length – 5 in.
	Height – 3 ½ in.
	Thickness - .007 in.

	Maximum size	Length – 11 ½ in. Height – 6 1/8 in. Thickness – ¼ in.

Flats (Larger than letter size)

	Minimum size	Length – over 11 ½ in., or Height – over 6 1/8 in., or Thickness – over ¼ in.
	Maximum size	Length – 15 in. Height – 12 in. Thickness – ¾ in.

Post Cards

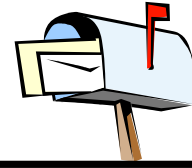|	Minimum size	Length – 5 in. Height – 3 ½ in. Thickness - .007 in.
	Maximum size	Length – 5 in. Height – 4 ½ in. Thickness - .0095 in.

U.S. Postal Service Mail

Letter Addressing

Address Placement
The destination address block must be more than ½" from both the left and right edges of the envelope and 5/8", but no more than 2¾" from the bottom. Keep the bottom 2¾" of the envelope clear of everything but the delivery address.

Address Format. It is crucial that the destination address (street address or PO Box number) appears on the line immediately above the city, state, zip code. For best results, always use the following format.

- Capitalize everything in the address.
- Use sans serif, non-proportional fonts. Arial and Courier 10-12 point fonts read best. Do not use bold, italics or underlining.
- Use two-letter state abbreviations (UT, NV, ID, CA, MO, etc.).
- Eliminate all punctuation except the hyphen between the zip code and plus-4. If abbreviations are used, use common abbreviations:

ST-Street	BLVD-Boulevard	CIR-Circle
CT-Court	DR-Drive	PKY-Parkway
AVE-Avenue	APT-Apartment	FL-Floor

- Left justify the address block.
- Use Black ink on white envelopes. Colored envelopes do not read well and do not accept meter ink well.
- Ensure that only the address information is visible in the window.

Dual Address Format

You may use both a Post Office box number *and* a street address when addressing mail. However, mail will be delivered to the address line immediately above the city, state and zip code line. For example:

Mail will be delivered here ⇒

    GRAND PRODUCTS INC
    100 MAJOR ST
    PO BOX 200
    PORTLAND OR 97214-1100

OR

Here ⇒

    GRAND PRODUCTS INC
    PO BOX 200
    100 MAJOR ST
    PORTLAND OR 97214-1000

NOTE: The zip code must be correct. If both the PO Box and Street address are on the same line, mail will be delivered to the PO Box.
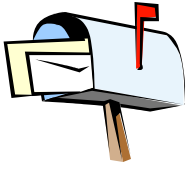
Ancillary Service Endorsements (Endorsements).

Endorsements are placed on envelopes to instruct the USPS what to do if the mail piece cannot be delivered as addressed. For automation purposes, only *Return Service Requested* (a free service which returns the mail piece to the sender with the corrected address information) and *Address Service Requested* (a fee service which forwards the mail piece and returns to the sender the corrected address information) are permissible.

Endorsement Standards

Must be printed in eight point type and appear in one of the following locations:

1. Immediately below the return address
2. Immediately above the delivery address

Due to metering considerations, SMS prefers that our customers use location 1. In addition, a ¼" clear space must be maintained around the endorsement.

International Format -- All foreign countries impose various restrictions depending on the country and item(s) being mailed. **Call Steve Connell at 323-4303 for information regarding international mailings.**

USPS Mail Classifications

Business Reply Mail – This service is a postage paid service for mailers wanting to pay the postage on **return** pieces of mail. When determining if BRM is appropriate, the mailer should consider the importance of the response to the agency. If the recipient is required to respond, the mailer should use a properly formatted Courtesy Reply envelope (BRM should not be used). **However, the use of BRM typically increases the response rate.**
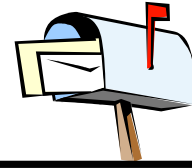
SMS has established a Business Reply account with the USPS for state use. All agency Business Reply Mail is sorted to one post office box by the USPS and postage charges are accumulated daily. SMS picks up the mail from this box at 7:00 a.m. daily, sorts the mail, and charges back postage and handling fees to each agency according to usage.

Each agency is responsible for their own Business Reply Mail envelope printing. Only SMS can generate camera-ready artwork for use with the state's permit. Contact John Larson at 323-4305 for information about Courtesy Reply and Business Reply Mail. **Always contact SMS prior to creating a Business Reply piece.**

Accountable Mail – Accountable Mail includes Certified Mail, Return Receipt, Registered Mail, Insured Mail, International Mail, FedEx, and DHL. This type of mail provides a mailing receipt, and the mailer can track delivery.

Priority and Parcel Post

Maximum size	108 in. (length and girth combined)
Maximum weight	70 pounds

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First Class Mail- First Class regular mail refers to mail that goes through the mail stream unsorted, unbarcoded, and at the full postage ($.37 for the first ounce). Non-standard sized pieces of mail (flats), hand-written or non-readable mail is sent First Class Single Piece.

All mail that weighs up to but does not exceed 70 pounds may go First Class. However, anything over 11 ounces, but not exceeding two pounds, will be sent Priority. First Class mail has an average destination arrival time of two days within the state and is the quickest transportation service, with the exception of special delivery and Express mail.

International Mail -- International surface mail is available to most countries. However, certain restrictions may apply. If you are sending international mail, contact SMS to determine the proper classification and documentation. SMS will also assist you with alternate mailing services for international mail.

Priority Mail -- Priority Mail is First Class mail that weighs over 11 ounces but less than two pounds. Weight and destination determine postal rates for Priority mail.

Priority Mail is a two-day service between 64 major markets (i.e. Atlanta to Dallas or Chicago to New York). When using Priority Mail, we recommend using priority envelopes that are available for no extra charge from SMS or your local Post Office.
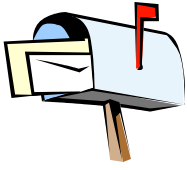
Registered Mail – Registered Mail, the most secure mail the USPS offers, provides added protection for valuable mail. Insurance may be purchased to cover articles valued up to $25,000. Restricted delivery and return receipt are available for additional fees.

Return Receipts – A return receipt is your proof of delivery, and is available for Insured, Certified, Registered, and domestic Express mail shipments. The return receipt identifies the article number, who signed for it, and the date it was delivered. You do not need to use a return receipt on all certified and registered mailings. Be sure to identify your mail stop, and department, on all return receipts so that we can route them back to you.

Standard Mail – Mail that weighs less than 16 ounces. The following is considered Standard Mail (A) matter:

Circulars	Catalogs
Booklets	Newsletters

Merchandise	Product Samples
Photographs	Printed Matter

Anything heavier than 16 ounces must be mailed as Package Service or Priority Mail. Reduced rates are available for mailing of 200 or more pieces or a mailing of 50 lbs.

Package Service -- The following is considered Standard Mail (B) or Parcel Post:

Packages or Parcels	Sound Recordings
Books	Library Materials
Merchandise	Films
Bound Printed Matter	Computer Media
Video Tapes	

Each piece of Package Service mail must not exceed 70 pounds in weight and a maximum size of 108" in length and girth combined. Quantity discounts are available for mailings of 200+ pieces. Call SMS for information.